



Agentforce: Turning AI Promise into Enterprise ROI with the Right Partner

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1. Executive Summary

Artificial intelligence has moved from pilots to enterprise-wide adoption.

Agentforce marks the next leap: autonomous AI agents that don't just recommend, but execute multi-step workflows, engage directly with customers and employees, and adapt as they learn.

At Dreamforce 2025, Salesforce further underscored this shift with the Agentforce 360 rebrand, repositioning its clouds under a unified, agent-first model spanning Sales, Service, Marketing, Commerce, IT, and Slack.

The message was clear: AI agents are no longer features within clouds, but the connective layer driving end-to-end execution across the enterprise.

For executives, the upside is compelling:

- ▶ **Cost advantage** through automation of routine work
- ▶ **Speed-to-market** with faster adoption and time-to-resolution
- ▶ **Competitive edge** by elevating customer and employee experience

Yet fewer than 30% of enterprise AI programs reach scale (Gartner 2024). The pattern is clear: most failures stem not from the tech, but from how it's deployed.

A framework for success with Agentforce:

- ▶ **Data readiness:** Clean, integrated data pipelines are non-negotiable
- ▶ **Integration discipline:** Tie agents into existing workflows, not silos
- ▶ **Change management:** Train teams, measure ROI, and govern responsibly

Technology alone won't deliver outcomes. Success depends on pairing Agentforce with the right partner ecosystem — experts who translate platform capability into measurable business impact.



2. Agentforce Explained: Salesforce's Next-Gen AI Platform

Salesforce has steadily evolved its AI capabilities:

- ⊙ **Einstein** brought predictive and generative AI.
- ⊙ **Copilot** embedded assistance across workflows.
- ⊙ **Agentforce** now introduces autonomous digital workers that execute end-to-end processes.

An Agentforce agent can:


- ⊙ **Execute** tasks such as resolving service tickets or qualifying leads.
- ⊙ **Integrate** systems by pulling data from Salesforce and third-party sources.
- ⊙ **Interact** naturally with humans using conversational AI.
- ⊙ **Learn continuously** from feedback and outcomes.


What distinguishes Agentforce is the shift from assistive AI to autonomous AI. Where Copilot answers a sales rep's question, Agentforce can independently send follow-up emails, create opportunities, and update CRM data (Salesforce 2024).


Key Insight: Agentforce is not simply a feature of Salesforce; it is a **new operating layer for the enterprise workforce.**


3. Why Agentforce Matters for Enterprises

Organizations across industries face similar pressures: rising customer expectations, margin pressure, and an increasingly complex regulatory environment. AI agents provide a scalable solution to these challenges.

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01 Customer Service
Agents resolve routine inquiries instantly, escalating only when human empathy is required. This reduces costs while improving CSAT.
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02 Sales Enablement
Agents qualify inbound leads, draft proposals, and nudge stalled deals, freeing sales reps to focus on high-value activities.
- 

03 Operations
Agents manage supply chain updates, track orders, and handle internal requests, ensuring resilience and efficiency.
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04 Compliance
Agents perform real-time monitoring of financial transactions, customer onboarding, or data access to ensure adherence to regulations.

When deployed effectively, Agentforce reshapes the productivity frontier — combining the speed of automation with the adaptability of AI (Forrester 2024).

4. Why AI Initiatives Fail (and How to Avoid It)

Despite its promise, Agentforce adoption is not straight forward. In fact, many enterprises underestimate the complexity of scaling AI agents.



Data Readiness

AI agents are only as good as the data they operate on. In many enterprises, Salesforce data is incomplete, outdated, duplicated, or scattered across clouds and external systems. When customer profiles, event signals, and historical context are fragmented, agents hallucinate, misfire, or underperform. Data hygiene, standardization, and real-time connectivity are prerequisites, not post-deployment fixes.



Process Misalignment

Agents cannot deliver ROI if workflows are poorly defined. Automating broken processes only scales inefficiency.



Integration Complexity

Salesforce rarely operates in isolation; ERP, HR, and financial platforms must be connected. This requires deep technical integration.



Governance and Trust

Without clear guardrails, agents can produce biased outputs or make errors that harm compliance.



Change Management

Employees may view AI agents as threats rather than allies. Adoption falters when roles in the human-plus-AI workforce are unclear.



Insight

The failure of AI initiatives rarely stems from inadequate technology. It stems from inadequate translation of that technology into organizational context (McKinsey 2023).



5. Why Partners Are Essential in Agentforce Success

Enterprises cannot close the ROI gap on their own. Salesforce partners play a central role in enabling Agentforce adoption to scale.



Think of Salesforce licenses as providing capability, while partners provide outcomes.

Next steps: See this in action in our on-demand webinar with our LevelShift experts: [Simplify Software Onboarding with Agentforce.](#)

6. A Partner-Led Framework for Agentforce ROI

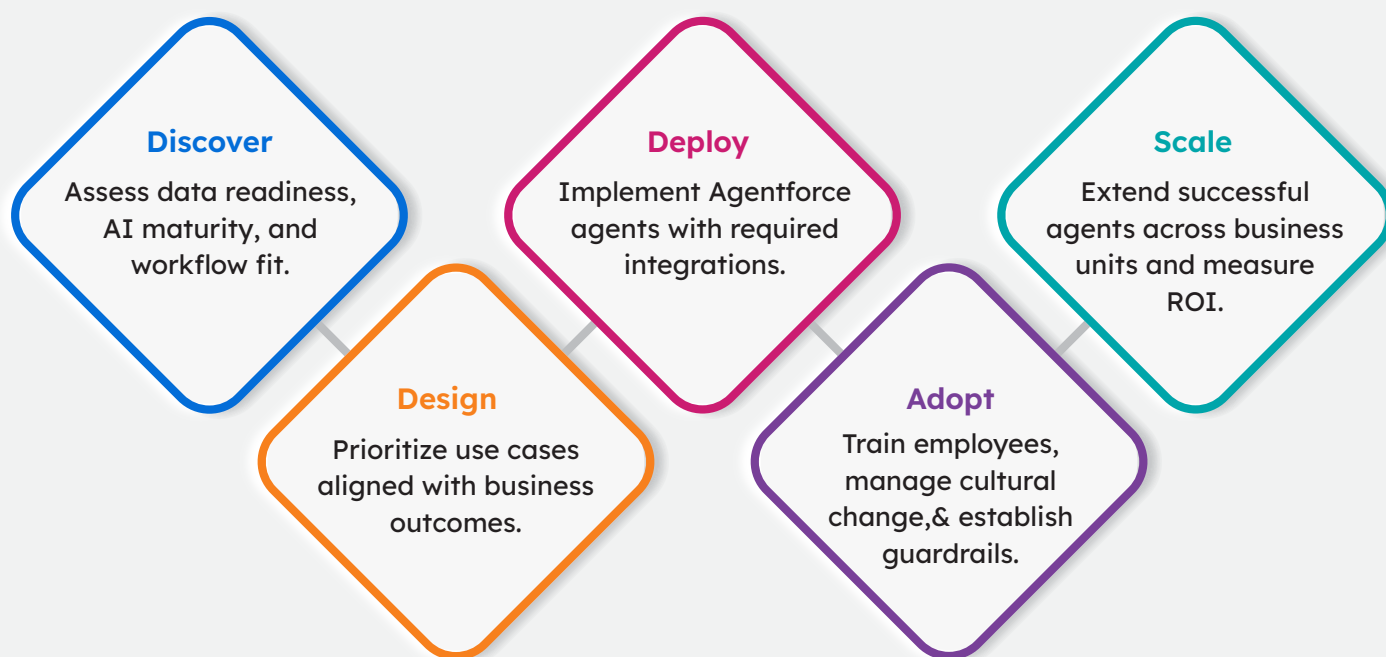
Before any framework, roadmap, or deployment plan, data readiness must be in place for Agentforce to succeed. Agents reason, decide, and act entirely on enterprise data. When that data is incomplete, outdated, duplicated, or locked in silos, agents don't simply underperform. They make confident decisions on weak signals.

Most Salesforce environments reflect this reality. Customer data is spread across multiple clouds, external platforms, and legacy systems. Signals arrive at different speeds. Ownership is fragmented. Governance varies by team. Without unifying, validating, and governing this data, even the most sophisticated agents struggle to deliver consistent outcomes.

Data readiness is also not a one-time fix. It demands continuous hygiene, clear ownership, real-time pipelines, and defined systems of record. Teams that treat data as a living foundation are the ones able to move beyond pilots and scale Agentforce with confidence.

This is why a structured, phased approach matters.

At LevelShift, we advocate a five-stage framework to guide Agentforce adoption:



This framework reflects lessons from two decades of Salesforce implementations: AI must be introduced gradually, aligned with business objectives, and measured rigorously (IDC 2024).



7. Industry Applications of Agentforce

One agent can't handle everything, and it shouldn't.

A Self-Service Quoting Agent built to create, update, and manage quotes in real time won't match the efficiency of a Supply Chain Optimizer Agent that streamlines operations with AI-powered intelligence.

The two functions aren't the same. Neither are the industries. That's why we build custom, intelligent agents tailored to specific industry needs.

Manufacturing Agent

- ▶ **Sales Contract Health Monitoring Agent**
 Guide contract decisions with automated summaries, compliance tracking, pricing analysis, and forecasts.
- ▶ **Shop Floor Mentor Agent**
 Empower teams with contextual insights, real-time guidance, smart collaboration, and automated knowledge capture.
- ▶ **Supply Chain Optimizer Agent**
 Streamline supply chains with AI-powered forecasting, automation, supplier insights, and predictive analytics.

Finance Agent

- ▶ **Automated Document Requests Agent**
 Send personalized requests for onboarding, financial records, compliance documents, and verification needs.
- ▶ **Onboarding Tracker Agent**
 Monitor client onboarding in real time, updating advisors on progress, missing documents, and next steps.
- ▶ **Supply Chain Optimizer Agent**
 Create comprehensive client profiles using interaction data, financial insights, preferences, and history.

Technology Agent

- ▶ **Software Onboarding Agent**
 Guide users with onboarding, product tutorials, troubleshooting, and seamless resolution for software issues.
- ▶ **Self-Service Quoting Agent**
 Create, update, and manage quotes in real time, allowing pricing adjustments, discounts, and quick downloads.
- ▶ **Ad Manager Assistant Agent**
 Track inventory, optimize ad placements, monitor campaign performance, and summarize advertiser billing.

Our offerings extend beyond the industries mentioned above.

Visit our [AI Agents Library](#) to find an agent suited to your industry and business needs.

Need help deciding? Our experts are here to [help](#).

8. Measuring ROI: Partner-Driven Metrics

The ultimate question for executives is: what value will Agentforce deliver?

When deployed with partner support, measurable gains include:



These numbers reflect both Salesforce platform strengths and the added value of partner-driven adoption (Salesforce 2024).

9. The Human + AI Workforce: Partner as Change Enabler

Agentforce introduces not just a new technology, but a new social contract inside the enterprise. Employees need clarity on the role of AI agents.

- Humans remain responsible for empathy, strategy, and creativity. Optimizes inventory, supply chain, and maintenance.
- Agents take over repetitive, structured, or data-driven tasks.
- Partners orchestrate the transition, designing training and adoption programs that ensure employees see AI as augmentation, not displacement.

This human-AI collaboration is the future of enterprise productivity.

Success Story: Ever.Ag

“LevelShift helped us turn complexity into clarity with Agentforce.”

That’s how Chris Sirosky, EVP of Customer Experience at Ever.Ag, describes their transformation with LevelShift. By leveraging Agentforce with LevelShift’s partner-led approach, Ever.Ag simplified complex processes, improved customer engagement, and realized tangible ROI.

Hear the full story from Chris Sirosky, EVP of Customer Experience at Ever.Ag

Conclusion: From Technology to Transformation

Agentforce is a breakthrough in enterprise AI, but it is not a silver bullet. Left unguided, it risks joining the long list of AI pilots that never scale. With a trusted Salesforce partner, however, enterprises can move beyond experimentation into sustained ROI.

For executives, the choice is clear:

- View Agentforce as a product purchase, and risk disappointment.
- Approach Agentforce as a transformation journey with the right partner, and unlock new frontiers of growth.

LevelShift offers an Agentforce Readiness Assessment — a structured, partner-led approach to evaluate your workflows, design your agent roadmap, and accelerate your ROI.

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